

**CHARTER**  
**STUDENT AID AWARENESS IPT**  
**PUERTO RICO PARTNERSHIP SUB-TEAM**

**TEAM NAME-**

**PUERTO RICO PARTNERSHIP**

**SHARED AND MEANINGFUL PURPOSE-**

**PURPOSE-**

To guarantee the Puerto Rico potential student population has access to the same information that is available in English so that it has as much access to postsecondary education as all other populations and to insure that we are current in our understanding of the needs of the Puerto Rico education community and continually update access to reflect these needs. This is all to the end of helping put America through postsecondary school and to insure that applicants get the right information at the right time to help them make informed decisions on financial aid options.

**WHY NOW?-**

The SFA Customer Service Task Force Report highlighted the need to expand current initiatives and partner with Puerto Rico education entities to identify and address the needs of the community. It also emphasized the need to translate more ED publications into Spanish.

**VISION OF SUCCESS-**

**GUIDING PRINCIPLES FOR THE YEAR 2000-**

- Must contribute to the fulfillment of the performance goals of the SFA 5-year performance plan, the modernization plan, and the customer-service task force
- Must end in September of 2000 with concrete recommendations for a 2-year follow on IPT with objectives and activities
- Must do a stakeholder analysis, listing key stakeholders and their interests and needs
- Serving America's students
- Building the foundation for the future
- Working cross-functionally and collaboratively between SFA Channels and other ED offices
- Initiating and building partnerships with other organizations that can expand in the future
- Constantly communicating with others and inviting others to communicate with us about new and on-going efforts in the Student Aid Awareness arena.
- Continually enrolling people who are involved in individual efforts
- Looking for opportunities to develop and stretch people—both ourselves and others

<b><i>SPECIFIC AND CHALLENGING GOALS -</i></b>			
<b>TOPIC</b>	<b>PERFORMANCE INDICATOR</b>	<b>GOALS</b>	<b>FUTURE PURPOSE</b>
	<ul style="list-style-type: none"> <li>• Degree to which an action plan meets the needs of the Puerto Rico education community</li> <li>• Number of student aid materials translated for the Puerto Rico education community</li> <li>• Number of SFA Spanish publications existing on the website</li> </ul>	<ul style="list-style-type: none"> <li>• An action plan developed to build on those items regarding Puerto Rico in the OSFA Reinventing Service Report that are in alignment with the modernization effort by 9/2000</li> <li>• At least three student aid materials translated based on Puerto Rico education community needs assessment by 9/2000</li> <li>• All current SFA Spanish publications are accessible through SFA website by 9/2000</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure the Puerto Rico potential student population has access to the same information that is available in English so that it has as much access to post-secondary education as all other populations</li> <li>• We are current in our understanding of the needs of the Puerto Rico education community</li> <li>• Continue to expand student access in other languages</li> </ul>
<b><i>SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS-</i></b>			
<ul style="list-style-type: none"> <li>• Sensitivity to non-Spanish speaking US citizens living in Puerto Rico</li> <li>• Sub-team updates Student Aid Awareness Leadership Team bi-weekly</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>			
<b><i>CLEAR ROLES -</i></b>			
<b>Sponsor</b>		• Jeanne VanVlandren	
<b>Team Leader</b>		• Linda Hall	

<b>Core Team Members</b>	<ul style="list-style-type: none"> <li>• Someone from OIIA</li> <li>• Pat Dorn</li> <li>• NY case team</li> <li>• Arva Reeves</li> <li>• An intern student or student association representative who is a Puerto Rico resident and is bilingual in Spanish</li> <li>•</li> </ul>
<b>Advisory Members</b>	<ul style="list-style-type: none"> <li>• Someone from SFA University</li> <li>• Someone from grassroots Puerto Rico community</li> <li>• Someone from the financial aid community in Puerto Rico</li> <li>• A senior level advisor from the Governor's office</li> </ul>
<b>Recorder/Documenter</b>	•
<b>Facilitator</b>	•
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<b>DECISION-MAKING-</b>	
• In general	• Consensus with fallback to Linda Hall
• Funding	• Sub-team makes requests of SAA Leadership Team for approval
•	•
<b><u>A COMMON AND COLLABORATIVE APPROACH-</u></b> <b>AN AGREED UPON PROCESS MAP AND WORK PLAN-</b>  <b>OPERATING AGREEMENTS AND PRINCIPLES- how we want to work together-</b> <ul style="list-style-type: none"> <li>• Agree to move on</li> <li>• Work cooperatively</li> <li>• Interject ideas at appropriate time</li> <li>• Team defends a position to sponsor and others—speak with one voice</li> <li>• Open, honest discussions</li> <li>• Reach consensus on decisions, not majority vote</li> <li>• Ask input from all members on each topic</li> <li>• Think outside box</li> <li>• Have fun—enjoy it</li> <li>• Volunteer for assignments</li> <li>• Respect others' opinions</li> </ul>	

- Be accountable

**HOW OFTEN THE CORE TEAM WILL MEET AND OTHER KEY AGREEMENTS-**

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**COMPLEMENTARY SKILLS AND RESOURCES -**

**KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS-**

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**COMPETENCY REQUIREMENTS FOR THE TEAM-**

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**RESOURCE REQUIREMENTS- –(time, people, money, materials)**

- \$10,000 for travel, materials, other contingencies, ...
- \$10,000 for travel to Puerto Rico
- \$150,000 for translator
- \$200,000 printing and associated costs–(fulfillment, etc.)

**OTHER**

- There are 159,000 Pell grant recipients in Puerto Rico